

**Probate Conservatorship Task Force  
Business Meeting**

**San Francisco, California  
January 10, 2007**

**Minutes**

**Task Force Members Present:** Hon. Roger W. Boren (*Chair*), Hon. S. William Abel, Hon. Aviva K. Bobb, Ms. Judith Chinello, Ms. Michelle Williams Court, Hon. Don Edward Green, Hon. Donna J. Hitchens, Hon. Frederick Paul Horn, Hon. Laurence Donald Kay (Ret.), Ms. Gina L. Klee, Hon. William H. Kronberger, Dr. Margaret Little, Ms. Margaret Lodise, Ms. Patricia L. McGinnis, Hon. Barbara J. Miller, Hon. Douglas P. Miller, Mr. Richard Narver, Ms. Gloria Ochoa, Ms. Jacquie Paige, Ms. Sandy Sanfilippo, Mr. Alan Slater, Ms. Pat Sweeten, and Mr. Alfredo Terrazas

**Task Force Members Not Present:** Hon. Sandra Lynn Margulies, and Hon. Steven E. Jahr

**Task Force Staff:** Chris Patton, (*Lead*), Althea Lowe-Thomas, Douglas C. Miller, Dan Pone, Susan Reeves, and Evyn Shomer

**Item 1            Welcome and Introduction of Members**

Justice Roger Boren, Chair, called the meeting to order and welcomed task force members. Introductions were made, the agenda for the day was reviewed, and the minutes from the November 28 meeting were approved.

**Item 2            Public Comments**

No members of the public were present.

**Item 3            Best Practices Working Group**

The working group and task force agreed that the topic of program funding (current and ongoing) should be dealt with in a separate section in the final report to the Judicial Council. Sections that have funding issues should be tagged throughout, but the discussion of funding should take place only once.

The task force also decided it was appropriate to recommend changes that go beyond simple compliance with the new Omnibus Conservatorship and Guardianship Reform Act of 2006, and make recommendations that reflect an ideal situation.

The task force discussed the revised recommendations in depth. The working group will incorporate suggested changes and present the proposed revisions at the task force's February 14, 2007 meeting.

**Item 4            Report on Court Conservatorship Survey**

Karen Viscia, Senior Research Analyst from the AOC's Office of Court Research gave a brief overview of recent focus groups conducted with 35 subject matter experts from 12 courts. The experts helped to document every task in a conservatorship case which will now provide a baseline for the general conservatorship case management process. Dag MacLeod, Manager, Office of Court Research, provided a very high level overview of the data collected on staff levels and utilization, i.e. how many full time employees (or equivalents) are performing which job functions. Data is still being processed and reviewed, and a full report will be forthcoming.

**Item 5            Rules and Laws Working Group**

Revised recommendations were discussed and, with minor changes, will be presented for final approval at the February 14 meeting.

**Item 6            Education and Training Working Group**

It was decided to appoint one member of the Education and Training Working Group to liaison with the Probate and Mental Health Advisory Committee on the proposed Rules of Court regarding qualifications and training.

**Item 7            Timeline**

The task force agreed to finalize all working group recommendations at the February 14, 2007 meeting, and continue to target presentation of its final report to the Judicial Council at their June 29, 2007 meeting.

**Item 8            Other Business**

With no further business, the meeting was adjourned at 3:00 p.m.

*Approved by the Probate Conservatorship Task Force on February 14, 2007.*